

Southeastern Europe Commercial Quarterly

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Winter 2004–2005

Albania's Energy Sector —An Electrifying Future

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To Our Readers

With the September 2004 issue, CEEbIC's long-running newsletter, *Central and Eastern Europe Commercial Update*, ceased publication. It has been replaced by this new quarterly publication that you now hold in your hands, the *Southeastern Europe Commercial Quarterly*. This change partially reflects a change in focus that came with the accession of some countries in the CEEbIC portfolio to the European Union. Readers of our new quarterly will continue to find here the same mix of in-depth reports on business developments in our region and listings of business opportunities for U.S. companies. As always, we invite your comments and welcome you to visit our Web site for more information, at www.mac.doc.gov/ceeibic.

Since 2001, Albania's economy has been growing at nearly 6 percent annually, and future growth figures are projected to follow this trend. Albania's growing economy is unable to meet current market demands for energy, and the country experiences frequent power shortages. To continue this upsurge of economic growth, Albania is restructuring many aspects of its energy sector and is developing new projects to increase its energy supply. Albania's power generation and transmission equipment is in general need of upgrade and rehabilitation. The Albanian government is also seeking to diversify the country's sources of energy; currently 95 percent of Albania's electricity comes from hydropower generation. In many rural areas, there continues to be a reliance on wood fuel.

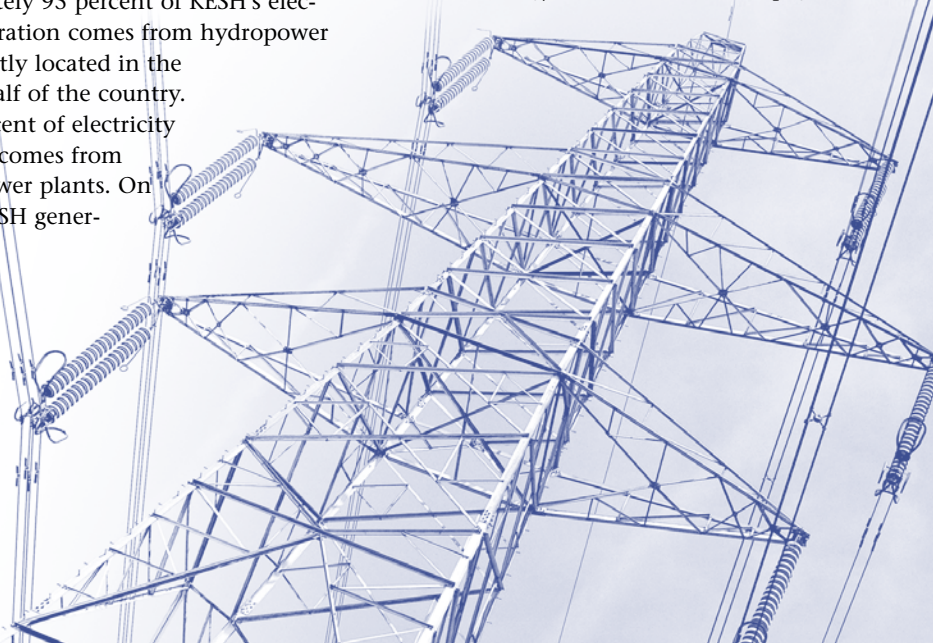
Electricity Generation

The upcoming restructuring and future privatization of Albania's state-owned electricity monopoly, Albania Power Corporation (KESH), may offer export and investment opportunities for U.S. companies. KESH is responsible for generation, transmission, and distribution of electric power. Approximately 95 percent of KESH's electricity generation comes from hydropower plants, mostly located in the northern half of the country. Only 5 percent of electricity generation comes from thermal power plants. On average, KESH generates 4,160 GWh of electricity annually. Nearly one-third of electricity production is lost because of poor

transmission facilities, combined with out-of-date production equipment. Albania regularly experiences power shortages and must import electricity to meet demand. Additional energy production is crucial, as current production only covers one-half to two-thirds of domestic demand. According to the Albanian government's National Strategy for Energy, by 2015 the demand for energy from industry will reach 539 ktoe (thousand ton oil equivalent), 629 ktoe from residential, 572 ktoe from services, 16.4 ktoe from construction, and 1,001 ktoe from transportation.

The Albanian government, with the assistance of the international community, has developed a strategy for the electricity sector, which includes restructuring the electricity industry and its regulatory framework, liberalizing the market and unbundling the electricity company, participating in the regional energy market, and planning for privatization. As a precursor to privatization, KESH will be spun off into at least three companies for generation, distribution, and transmission. In July 2004, KESH established a

Albania's Energy Sector—continued on page 6



Commercial Opportunities



Croatia: Tender for the Supply of Sugar Free Dark Chocolate Chips

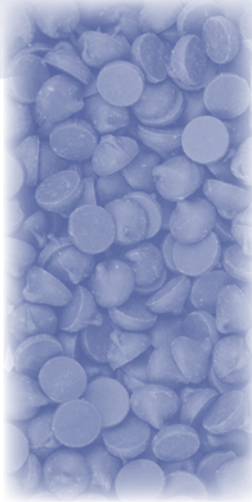
Delicia Ltd., a manufacturer of biscuits and cakes with revenues of €190,000 in 2003, is looking for U.S. suppliers of sugar-free dark chocolate chips. The approximate quantity sought is 3 tons per year. Potential suppliers are asked to provide pricing and shipping terms with product information. The deadline for receipt of bids is Feb. 28, 2005. For additional information, contact:

Mr. Drazen Horvat, Director
Delicia Ltd.

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E-mail: keksi@delicia.hr



Kosovo: Tender for the Acquisition of Forensic Laboratory Testing Services

The United Nations Mission in Kosovo Police for Kosovo Police Service (KPS) invites sealed bids for a large-value long-term contract for the acquisition of forensic laboratory testing services for KPS, initially for 12 months with possibility of a 12-month extension.

Please address all queries or questions in writing. No telephone calls or personal visits will be accepted.

Kosovo Police Service Procurement Unit

Attention: Director, KPS Procurement

Administrative Support Building, 2nd Floor, Room 218/A,

Police Avenue, Pristina, Kosovo

Fax: +381-38-504-604-5394

E-mail: kpsdprocurement@hotmail.com or

mhq-kpsdp@un.org

Serbia and Montenegro: Equipment for Oil, Steel, and Food Industry



Kobing Engineering in Belgrade, Serbia, is seeking U.S. exporters of can-filling and closing equipment, to be used in the oil, steel, and food industry. For more information, please contact:

Boris Popovski

CEEbic Commercial Assistant

U.S. Embassy Belgrade

Tel: +381-11-306-4910

E-mail: boris.popovski@mail.doc.gov

Deadline: None.



Bulgaria: Ostrich Breeder Seeks Incubator and other Related Equipment

An ostrich breeder in Bulgaria seeks the following:

- Incubator for ostrich eggs (40–60 pieces)
- Hatcher for ostrich eggs (20–25 pieces)
- Air-conditioner for supporting temperature in a 20-square-meter room
- A generator with the capacity necessary for the requested equipment

For more information, please contact:

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Deadline—Shipping Terms: February 10, 2005

Date needed by: March 10, 2005

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Exporter's Corner

Frequently Asked Question

Here is a question CEEBIC is asked frequently: Are there sources of legal assistance for businesses that are new to exporting?

A list of attorneys in Central and Eastern Europe is available on the CEEBIC Web site at www.mac.doc.gov/ceebic/attorneys.htm. In addition, the U.S. Small Business Administration's International Trade Program sponsors the Export Legal Assistance Network (ELAN) program. Under the ELAN program, international trade attorneys from the Federal Bar Association provide free initial consultations to small businesses interested in starting export operations. For more information about the ELAN program, go to the Web site at www.fita.org/elan/ or call the Small Business Answer Desk at (800) 8-ASK-SBA.



Southeastern Europe Potpourri



Serbia and Montenegro: Record Growth of "Plastic" Money

The board of Visa International announced that Serbia has issued a record number of Visa cards. Visa cardholders increased by 590 percent (from 107,000 to 750,000) from June 2003 to June 2004. The total payments made with Visa cards increased 340 percent, reaching \$202 million through 600,000 transactions in the same period. The number of vendors that accept credit cards increased to 5,761, an increase of 83 percent. The number of automated teller machines (ATMs) increased from 200 to 800. (Source: U.S. Embassy Belgrade)



Albania: Birra Tirana Brewery Wins Award

Albanian brewery Birra Tirana won the International Platinum Star for Quality at the World Quality Commitment 2004 exhibition in Paris. Approximately 132 companies participated at the competition. (Source: <http://alb.albaniannews.com>)



Basketball Brings Together Former Yugoslav Republics

Bosnia and Herzegovina, Croatia, Serbia and Montenegro, and Slovenia are considering making a joint bid to host the 2010 World Basketball Championship. The initiative, launched by the office of Serbian President Boris Tadic, is attracting widespread interest, and many say it could help boost relations between the former Yugoslav republics and improve the region's international profile. Although the former Yugoslavia was an international basketball power, the independent countries that succeeded it have been hampered by a lack of resources. By working together, backers of the proposal say, the four countries can bring about a result that would be hard to achieve independently. (Source: www.setimes.com/cocoon/setimes)



Market Brief:

The Telecommunications Sector in Montenegro



by Vesna Brajovic, Commercial Specialist

Over the past year, the telecommunications sector in Montenegro has undergone radical transformation. Industry globalization, through cross-border investments, and public policy initiatives such as privatization and deregulation have allowed domestic companies to focus on consumer needs and have increased demand in mobile and Internet services and data information. Ownership transformation continues to be essential

Montenegro has a population of 620,000, and mobile penetration is about 77 percent.

for increasing much-needed financial, technical, and managerial capabilities.

The Montenegrin market for telecommunications accounts for 10 percent of Montenegro's gross domestic product, which in 2002 was \$1.2 billion. The average household expenditure on telecommunications services is 4.3 percent.

In the future, as Southeastern Europe continues to integrate with Western Europe, the telecommunications sector will focus on increased investment in integrated voice, data, and video services for business and residential clients.

Market Players

The following companies provide telecommunication services:

Fixed-Line Services

Telekom Montenegro (Telekom Crne Gore, or TCG) currently enjoys a monopoly of fixed lines. It is the only public telecommunications operator with a license to provide public fixed-line services. The government of Montenegro controls 51.12 percent. Employees, private funds, and citizens in general hold the remaining 48.88 percent as a result of a mass voucher privatization program that was completed in 2001.

TCG also controls three other operators (100 percent, 85 percent, and 51 percent, respectively): Monet is a GSM operator, Internet Cg is the dominant Internet service provider, and Montenegro Card provides payphone services.

Privatization has been difficult, and two attempts to privatize TCG have failed. A new attempt is currently under way, with the aim of privatizing the entire TCG group. In the interim, TCG has continued to expand by improving activities, investing in company development, and keeping up with the latest technology. TCG has an installed plant of 240,000 lines and 200,000 lines in service. Investments in telecommunications infrastructure have brought TCG toward full digitalization and created conditions to provide a range of high-quality services. Additionally, TCG has

developed an IP (Internet Protocol) network to benefit from the growing Internet market.

Wireless and Mobile Services

Montenegro has a population of 620,000, and mobile penetration is about 77 percent. The total market for May 2004 was 449,769 subscribers. Of this number, 336,369 (81 percent) were prepaid subscribers, and the rest were postpaid. Two companies control the mobile sector: ProMonte GSM, which is a Norwegian company, and Monet GSM, which is a 100 percent subsidiary of TCG.

ProMonte GSM, which is 100 percent owned by Norwegian Telenor Mobile Communications, entered Montenegro's market in 1995. It launched commercial mobile operations in Montenegro in July 1996. ProMonte is the leading mobile operator in Montenegro, with 260,000 subscribers, which is 57.89 percent of the market share (as of the end of June 2004). ProMonte has established roaming service on all seven continents, providing several different choices of operators to its customers.

Monet GSM is the first Montenegrin operator of mobile services. It started its commercial services in July 2000. Today Monet registers about 190,000 subscribers and has 42.11 percent of the market share. Monet has established 121 roaming partners in 72 countries. Monet covers 64 percent of the territory with a signal stronger than 95 dBm.

Internet Services

Overall penetration in the Internet market is low and underutilized by the commercial and business sector. Two companies are licensed to provide Internet services in Montenegro: Internet CG (ICG), which is a joint venture between TCG and two private investors, and Informatika Montenegro, which is partially owned by Informatika Belgrade.

ICG started its commercial service in 1997. It is a joint venture between TCG and two private investors; the stakes are 25 percent, 15 percent, and 60 percent, respectively. In 2003, TCG decided to increase its ownership by 60 percent, effective February 2004. ICG currently has 70,000 dial-up users, and its total Internet penetration is 11 percent. ICG has almost 97.7 percent of the market share.

Informatika Montenegro was awarded a license in November 2002. Currently, it is the only competitor to ICG. Informatika Montenegro's Internet service provider is known as Infosky, which has about 1,036 dial-up users and 60 access lines. It has 2.3 percent of the market share. Informatika is planning further expansion into other cities in Montenegro.

Pay Phones

Montenegro has two providers of public pay phone services: Post Office Montenegro and Montenegro Card. Post Office Montenegro was established in 1998 and has 443 public pay phones in Montenegro. Montenegro Card was established in 1999; 51 percent is owned by TCG. It is a joint venture with Hellascom, Greece. Montenegro Card has 300 public pay phones installed in the major cities in Montenegro.

Cable Television

The cable television sector is of secondary interest, since there is no service overlap between cable television and the telecommunications sector. However, U.S.-based manufacturers and suppliers are strong in the region, especially in Serbia and Bulgaria. The main player in cable television is TCG, which has a wide license. There is also a private-sector cable operator, Budva Cabling, which mainly serves the coastal resorts.

Sector Prospects

The prospect of privatization in TCG obviously looms large in sector development, given TCG's dominance in the fixed-line market and strong presence in mobile, Internet, and cable television operations. The government is looking forward to maximizing benefits for the Montenegrin economy by privatizing TCG. Montenegro needs its existing legal, regulatory, and policy framework strengthened, particularly to align the laws on telecommunications with European Union (EU) directives, including one on universal service.

Government Role

To address legal and regulatory concerns, Montenegro has had its own law on telecommunications since 2000. The government of Montenegro, with the support of the U.S. Agency for International Development, ensured that the law provided a clear regulatory framework for Montenegro's telecommunications sector and would be compatible with the EU regulatory framework. The law distributes basic responsibilities between the government of Montenegro and the Ministry of the Economy. Both are responsible for telecommunications activities and for the Agency for Telecommunications of Montenegro.

Under the law, the ministry controls and adopts telecommunications sector development plans and oversees the submission of the plan to the government, which implements the plan once it has been ratified by the legislative body. Currently, the ministry

has been unable to perform its responsibilities because of fiscal and personnel limitations. Telecommunications sector development requires highly specialized expertise and experience, which the Ministry of the Economy lacks.

Regulatory Bodies

In agreement with the telecommunications law, the Agency for Telecommunications was established in March 2001 as an independent regulatory agency for the sector. The agency is responsible for promoting competition and access to networks, issuing licenses, and regulating tariffs. It also adopts regulations and corresponding rules in compliance with international standards and directives and applicable practices in the European Union.

Montenegro has a separate law on broadcasting and a separate sector regulator, the Broadcasting Agency of Montenegro. Because of irregularities and overlapping competencies in the two agencies, the ministry has considered merging the agencies.

Infrastructure and Technology

The basic telecommunications infrastructure in Montenegro is well developed. Since the split of the old Post Office and Telecommunication Company in 1999, the telecommunications infrastructure has greatly improved. Currently, the level of telecommunications development exceeds the overall development of the country. In the past couple of years TCG has attracted significant investment, which helped expand capacities and increase market penetration. Almost 98 percent of TCG equipment is modern digital technology. TCG is also planning to expand its networks in the less populated areas of Montenegro by placing radio access systems based on the GSM standard.

Broadband

The move to broadband connection in Montenegro is very slow. Although some businesses and domestic customers have made the switch from dial-up to broadband, the majority of people continue to use dial-up connections.

Sector Development Initiatives

The telecommunications sector in Montenegro presents a unique challenge, which includes barriers to sector development, market liberalization, and the establishment of open and healthy competition. The development of an objective approach that takes those barriers into account will be the subject of a technical assistance project, funded by the U.S. Trade and Development Agency (USTDA). The goal of the study is to observe various factors that could assist the minister of energy and other relevant stakeholders (such as the Agency for Telecommunications of Montenegro) in creating the environment and establishing the direction for the sector's development. The study will first provide an accurate picture of Montenegro's telecommunications sector and examine the existing legal and regulatory environment. On the basis of this information, the study will then be able to determine Montenegro's needs and map a future development plan.

Export Potential

Aside from some equipment sales, mainly in the Internet and cable television divisions, U.S. involvement in the market is currently minimal. However, the Agency for Telecommunications is expected to support efforts to stimulate the development of the sector, to encourage greater market liberalization, and to thereby increase the possibility of U.S. entry and investment. The technical assistance project funded by USTDA will include other development proposals and priorities for the government of Montenegro and the Ministry of the Economy, which may also open up additional opportunities for U.S. companies.

For the full report on Montenegro's telecommunications sector and additional contact information, please visit the CEEBIC Web site: www.export.gov/ceeibic.



Albania's Energy Sector — *continued from page 1*



Transmission System Operator, a key step to moving forward on the separation of generation, distribution, and transmission activities. The Transmission System Operator is critical for monitoring and controlling the main hydro and thermal generation resources and for ensuring the optimal and safe functioning of the national high-voltage transmission network. The government also plans to increase transmission efficiency and reduce losses by developing a high-voltage grid of 400 kV, 220 kV, and 110 kV lines. That project will also involve installing energy meters and expanding and strengthening the network, with the installation of 6,800 transformers in rural zones. Total investments needed for transmission improvements for 2002–2005 are estimated at \$60.93 million, and \$290.14 million in investments will be needed for 2006–2015.

Thermal Power

The Vlora Energy Park is Albania's largest and most complex economic development project. The project is supported by several international financial institutions, including the World Bank, European Investment Bank, and European Bank for Reconstruction and Development. The park covers 1,625 hectares and consists of (1) a 400-plus megawatt thermal power plant to be built in phases, (2) storage facilities for hydrocarbons such as liquefied petroleum gas and liquefied natural gas, (3) a refinery and oil separation plant, and (4) industrial processing and manufacturing facilities. Selection on the \$120 million, 125 MW oil-fired thermal power plant is expected to be completed by the end of 2004, with construction to begin thereafter. The construction will be done in two phases. The 125 MW Phase I of the Vlora thermal energy plant will begin producing electricity in 2006 and will have an estimated cost of approximately \$137 million. The second phase, which will expand the plant to 300 MW capacity, will have an overall estimated cost of \$217 million and a construction period of 24 months once the project is approved. Significant contracting and subcontracting opportunities for this project are anticipated for U.S. firms.

A power company has submitted another proposal to the Albanian government for the construction of a 1,200 MW gas-fired thermal power plant that is designed to connect to the Albanian power system and allow for the export of electricity to Italy. The estimated cost would be around \$1.2 billion.

Oil Sector

Albania relies on the importation of oil to meet its domestic demand. Albania extracts oil from 12 oil fields with 3,123 operating oil wells. Albania has 165 million barrels of proven oil reserves and has offshore oil reserves. The offshore oil exploration activities show that potential oil reserves are estimated to be 50 million cubic meters, and may be as high as 200 million cubic meters. The most probable new areas for oil exploration are in the Shpiragu region, where the oil concentration capacity in drilled wells is being evaluated; the Palokastra and Vlora region, where the results from the drilling of two wells are being analyzed; and the South Tirana region, where the drilling of oil wells is under way and results may be available by the end of 2004.

Three companies dominate the oil sector in Albania: Albpetrol, which handles oil extraction; Servcom, which is responsible for services; and ARMO (Albanian Oil Refining and Marketing), which manages refining and marketing. Oil extraction centers are located in Berat and Fier. The two major refineries are at Ballsh and Fier. The refinery at Ballsh has a capacity of 1 million tons; both refineries tend to operate at only 30 percent of capacity. Several foreign companies have been exploring and producing oil in Albania since 1992, including Occidental Petroleum, OMV, and Lundin Petroleum.

The privatization of Servcom is well under way, with the Albanian government reviewing offers from strategic investors

interested in purchasing shares of 51 percent to 80 percent of the company. The Albanian government recently announced they are accepting expressions of interests from strategic investors for a minimum of 51 percent of ARMO's shares. Once the expressions of interests are received in early December, the Albanian government will then invite interested investors to submit their offers. The oil extraction company, Albpetrol, is scheduled to be privatized by the end of 2005.

AMBO (Albanian-Macedonian-Bulgarian Oil), a U.S. consortium, has been promoting a pipeline that would follow the route of EU transportation Corridor VIII. The pipeline route would link the port of Bourgas, which



is on the Black Sea coast of Bulgaria, with the port of Vlora, which is on the Adriatic coast of Albania, to transport oil from the Caspian region to Western Europe and the United States. If this project is adopted, there may be export and subcontracting opportunities for U.S. companies. The pipeline will be 576 miles long and will transport more than 40 million tons of oil per year.

Renewable Sources of Energy

Wind and solar energy exploitation is an area in which government, international, and private investments are anticipated. Currently, Albania does not have operational wind energy power plants. To explore wind generation, the government is seeking investors to install 20 new windmills, with a capacity of 400 GWh per year, along the Adriatic coastline. Because of its geographic location, Albania has hot, dry summers, so

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EU Accession Extras

there is potential for the development of solar energy. As part of its national energy strategy, the Ministry of Industry and Energy is seeking investors to install enough solar panels to provide 62.9 ktoe energy by 2015. The total investment cost is estimated at \$79 million. The United Nations Development Program, through its Global Environment Facility, has undertaken several projects to encourage the use of solar energy and educate the public on energy efficiency.

Additional Resources for U.S. Companies

Given the significant U.S. export and investment opportunities in all areas of Albania's energy sector and the Albanian government's desire to involve U.S. companies in this strategic sector, CEEBIC has created a new section on its Web site devoted to Albania's energy sector: <http://www.mac.doc.gov/ceebic/countryr/albania/Energy1.htm>. Please visit the Web site for more detailed reports on the subcategories of Albania's energy sector as well as on tenders, projects, and trade and investment leads in the energy sector.

Sources

Country Commercial Guide:
www.export.gov/ceebic

Biznesi: www.biznesi.com.al

Albania-EU Energy Efficiency Centre:
www.eec.org.al

Albanian Daily News: www.albaniannews.com

World Bank: www.worldbank.org.al

Panorama: www.panorama.com.al

Albania International Investors Conference
Energy Sector Review: print publication
available through CEEBIC at (202) 482-2645
or via email at ceebic@ita.doc.gov

Albania-EU Energy Efficiency Centre: print
publication available through www.europa.int

Ministry of Industry and Energy of Albania's
National Strategy of Energy: print publica-
tion available through CEEBIC at (202) 482-
2645 or via e-mail at ceebic@ita.doc.gov



Regional: Simplified Pre-accession Funds

The European Commission has decided to simplify the current financial system for allocating assistance. The simplified system will apply to Croatia, Turkey, and potential candidate countries from the Western Balkans. Instead of the existing extensive collection of geographical and thematic instruments, such as PHARE, ISPA, SAPARD, and CARDS, only six instruments will be required under the new framework, including the following four which are new: European Neighborhood and Partnership, Development Cooperation, Economic Cooperation, and an instrument for stability. The two remaining instruments are Humanitarian Aid and Macro-Financial Assistance. (Source: *EU Enlargement Weekly*)



Croatia: Preaccession Strategy Announced

As part of the European Union (EU) enlargement agenda, the European Commission has offered some recommendations that will help Croatia move toward EU membership. The European Council plans to begin negotiations with Croatia in early 2005. A formal review of Croatia's progress toward membership will take place next year. In autumn 2005, the commission will start issuing regular reports on the country's progress. The commission has also recommended that Croatia receive €105 million in preaccession funds (PHARE, ISPA, and SAPARD) in 2005 and €140 million in 2006. Starting in 2007, Croatia will receive funds from the EU's new preaccession instrument. The amounts to be allocated are currently under discussion. (Source: *EU Enlargement Weekly*)



Macedonia: European Union Questionnaire Received

On October 1, European Commission President Romano Prodi delivered the commission's questionnaire to authorities in Macedonia. The questionnaire contains approximately 4,000 questions, examining both political and economic criteria in addition to all areas of EU legislation. Answers to the questionnaire will contribute to the commission's analysis on Macedonia's overall readiness for EU membership. Prime Minister Hari Kostov stated that the work would be complete by January. The questionnaire is a positive sign of the progress Macedonia has made toward EU integration. (Source: *European Union*)



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